



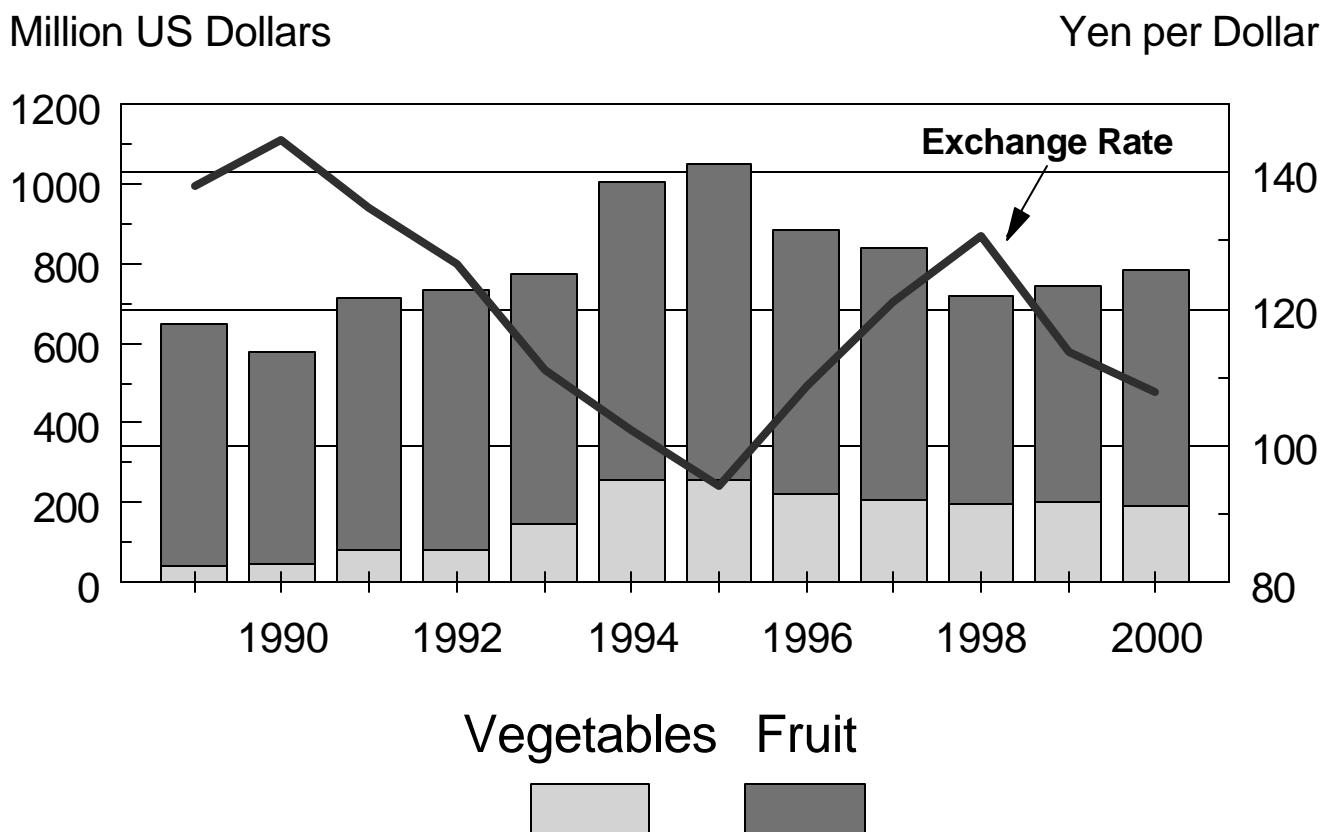
United States
Department of
Agriculture

Foreign
Agricultural
Service

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World Horticultural Trade and U.S. Export Opportunities

Japan's Fresh Vegetable and Fruit Imports from the U.S. and the Yen/Dollar Exchange Rate



Over the past twelve years, Japan's imports of fresh fruits and vegetables from the United States have responded strongly to the value of the Japanese yen in relation to the dollar. Japan's economic growth over the past decade has been negligible while real wages have increased as nominal wages have grown faster than consumer prices. In general, increased disposable incomes tend to lead consumers to demand value-added products of higher quality. Food expenditures are not expected to increase due to demographic pressures, as Japan's population growth over the past decade has been stagnant. The combination of these factors means that price is a key determinant of Japan's horticultural imports from the United States.

U.S. producer prices for vegetables and fruits increased 8 and 15 percent, respectively, from the beginning of the decade to 1999. This increase in U.S. prices was offset by the strong yen in the mid-1990's. Taking advantage of the lower yen-denominated prices, Japan's imports from the United States rose sharply in 1994 and 1995.

[Check Out the New U.S. Trade Internet System Website. Go to <http://www.fas.usda.gov/ustrade>]

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Export Summary

February 2001

U.S. exports of horticultural products to all countries in February totaled \$811 million, an increase of 5 percent from the same month a year earlier. Categories with the most significant increases in February were essential oils (up 24 percent to \$50 million), fresh fruit (up 12 percent to \$148 million), tree nuts (up 11 percent to \$74 million), fresh vegetables (up 9 percent to \$97 million), and processed vegetables (up 8 percent to \$142 million). The only category that declined was fruit and vegetable juices (down 7 percent to \$50 million).

February exports to Canada, the largest market, were up 7 percent from February 2000, to \$244 million. Exports to the European Union (EU) were unchanged at \$142 million. Exports to China showed the most dramatic jump for February 2001, up 52 percent from February 2000, to \$89 million, while exports to Korea rose 26 percent, to \$25 million and exports to Mexico rose 17 percent to \$76 million. Exports to Japan dropped 7 percent to \$133 million.

Exports so far in Fiscal Year (FY) 2001 are up 9 percent from the same period last year to \$4.64 billion. Tree nut exports are up 26 percent to \$609 million for the October-February 2000/01 period, while fresh fruit exports are up 13 percent to \$822 million, and fresh vegetable exports are up 12 percent to \$527 million. The fastest growing markets for FY 2001 to date are: China, up 109 percent; Malaysia, up 49 percent; Venezuela, up 24 percent; Taiwan, up 19 percent; Hong Kong, up 18 percent; Mexico, up 14 percent; and the EU, up 12 percent. Exports to Japan are down 2 percent for the October-February 2000/01 period compared with the same period last year.

New U.S. Trade Internet System

The public now has unlimited access to the most up-to-date data on U.S. exports and imports of agricultural, fishery, and forestry products. The U.S. Trade Internet System allows users the flexibility to customize their data searches and save their criteria for repeated use. Users can obtain value or volume data for selected harmonized codes or commodity groupings to track trends going back to 1989.

To view the site go to <http://www.fas.usda.gov/ustrade/>

For more information on the U.S. Trade Internet System, e-mail usthelp@fas.usda.gov

To access **FAS Attache Reports** on line, please go to the following Internet address:

<Http:// www.fas.usda.gov/scripts/attachrep/default.asp>

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries.

What's New on the Homepage?

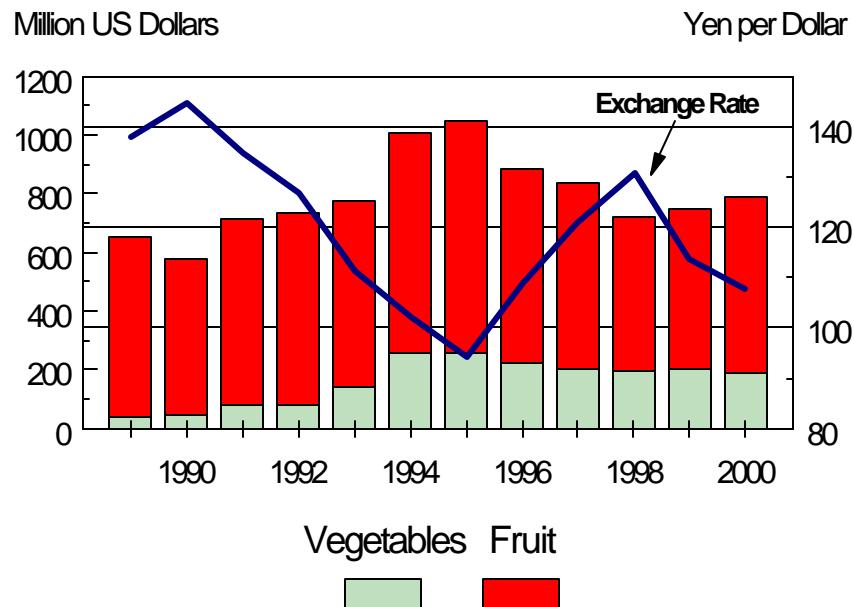
The Horticultural and Tropical Products Division has introduced a feature on its homepage designed to bring the latest information to the public as efficiently as possible. The site contains information on policy and technical developments affecting trade in horticultural commodities, selected reports submitted by FAS overseas offices, and special reports. For further information, please contact Nancy Hirschhorn (202)720-2974. Go to <http://www.fas.usda.gov/htp/>.

Exchange Rate Influences Japan's Horticultural Imports from the United States

Over the past twelve years, Japan's imports of fresh fruit and vegetables from the United States have responded strongly to the value of the Japanese yen in relation to the dollar. As the yen began to appreciate against the dollar in the first half of the 1990s, Japan's imports of U.S. horticultural products increased. Japanese consumers, enjoying increased purchasing power in dollars, responded by purchasing more from the United States. Then, starting in 1995, the yen began to lose value against the dollar. This depreciation caused Japan to shift its consumption away from the more expensive U.S. product.

Japan economic growth over the past decade has been negligible, while real wages have increased as nominal wages have grown faster than consumer prices. There is little reason to expect an income-driven increase in food consumption per capita as consumer sentiment in Japan's economy remains weak. In general, increased disposable incomes tend to lead consumers to demand value-added products of higher

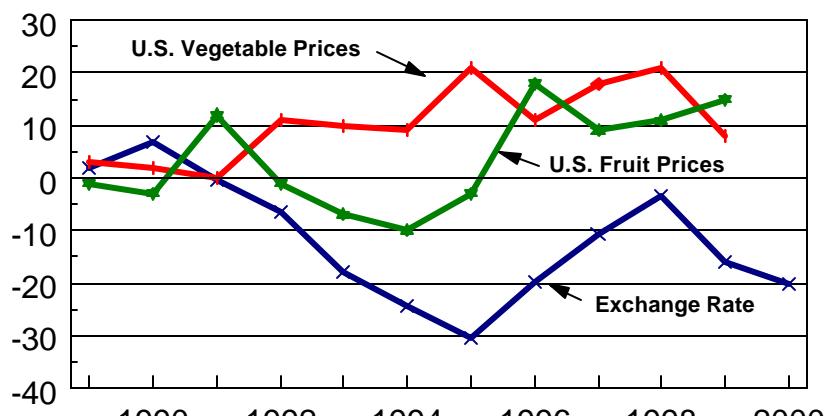
Japan's Fresh Vegetable and Fruit Imports from the U.S. and the Yen/Dollar Exchange Rate



Source: World Trade Atlas, IMF

Percent Growth of Yen/Dollar Exchange Rate and U.S. Producer Prices for Vegetables and Fruits Since 1989-91 1/

Percent Growth



1/ Base Year is Average of 1989-91

Source: IMF, NASS

quality. Food expenditures are not expected to increase due to demographic pressures, as Japan's population growth over the past decade has been stagnant. The combination of these factors means that price is a key determinant of Japan's horticultural imports from the United States.

U.S. producer prices for vegetables and fruits increased 8 and 15 percent, respectively, from the beginning of the decade to 1999. This increase in U.S. prices was offset by the strong yen in the mid-1990s. Japanese consumers actually noticed a fall in the price of imported U.S. horticultural products as the appreciation of the yen outpaced the rise in U.S. producer prices. Taking advantage of the lower yen-denominated prices, Japan's imports from the United States grew rapidly in 1994 and 1995.

Then, in the latter half of the decade, the yen began to depreciate against the dollar. The weakening yen, combined with relatively stable U.S. producer prices during this period, meant that the yen-denominated price of imported U.S. horticulture rose. Higher prices caused Japan to decrease its level of imports from the United States. The East Asian financial crisis in 1997/98 only exacerbated this trend. Japan's real gross domestic product (GDP) contracted by 2.5 percent in 1998 causing consumption and horticultural imports to fall.

For some commodities, such as citrus fruits and frozen french fries, higher prices of U.S. imports allowed lower-priced competitors to increase their access to Japan's import market. The degree to which competitors have gained access to Japan's import market will lessen the responsiveness of consumers to future appreciations of the yen against the dollar.

Since the financial troubles of 1998, Japan's imports from the United States have rebounded as the yen became stronger against the dollar. Should the yen continue its strength, one can expect Japan to continue to import more U.S. horticultural products. This appreciation of the yen, however, is threatened by an expansionary monetary policy as Japan attempts to revive economic growth. If Japan's monetary policy causes the yen to fall sharply against the dollar, Japan's imports from the United States will suffer.

Japan's Imports of U.S. Frozen Potato Fries Face Canadian Competition

Japan's imports of U.S. frozen potato fries nearly doubled and then leveled off over the past decade; from 103,923 metric tons in Calendar Year (CY) 1990 to 194,314 tons in CY 2000. This increased demand is primarily due to the growing popularity of fast food hamburger chains. McDonald's, Japan's largest fast food chain, currently has 3,400 stores nation-wide and is expanding at a pace of 300-400 new stores annually according to FAS attaché reports. Japan's sales of "ready-to-eat" and private brand potato fries are also increasing, accounting for an estimated 13 percent of total Japanese consumption of frozen potato fries.

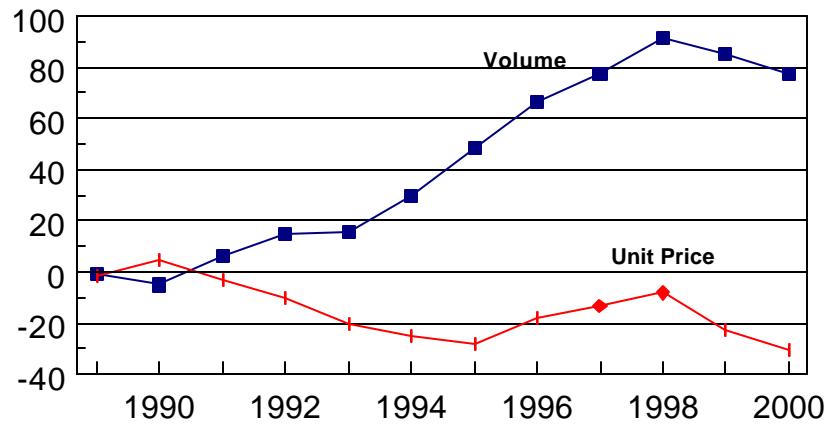
While the United States held more than 80 percent of the import market for the past decade, shipments from Canada have increased rapidly in recent years. Over the two-year period from 1998 to 2000, Japan's imports of Canadian potato fries increased more than 60 percent from 20,006 tons to 32,080 tons. This increase is attributed to falling Canadian potato fry prices, from \$1.06 per kilogram in 1998 to \$0.91 in 2000. Increased competition from Canadian fries has bid down the prices of imported U.S. fries; in 2000, the price of imported U.S. fries was \$0.89. Since Japan's imported potato fry market is currently stable, with annual imports of roughly \$270 million, continued price competition from Canada will continue to pressure the United States' market share.

Gradual U.S. Decline in Japan's Citrus Market

Since 1989, Japan's imports of U.S. citrus fruits have declined both absolutely and relatively. Citrus fruit imports from the United States totaled \$489.3 million in 1989. This value reached a high of \$552.6 million in 1995 before falling to \$403.5 million in 2000. The value of imported U.S. citrus peaked in 1995 due to an abnormally strong yen with respect to the dollar, which made U.S. products cheaper for the Japanese. As the

Japan's Imports of U.S. Frozen Potato Fries: Growth of Volume and Unit Price in Yen Since 1989-91 /1

Percent Growth

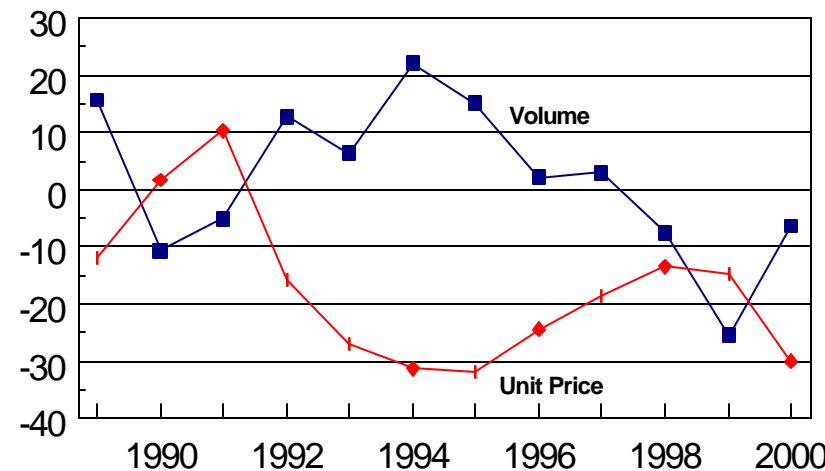


1/ Base Year is Average of 1989-91

Source: World Trade Atlas, IMF

Japan's Imports of U.S. Citrus Fruits:
Percent Growth of Volume and Unit Price in Yen Since 1989-91 1/

Percent Growth



1/ Base Year is Average of 1989-91

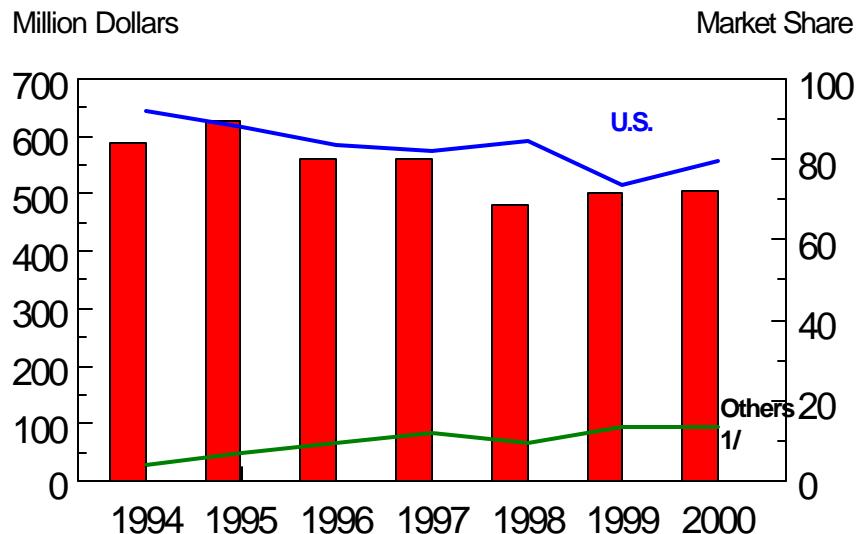
Source: World Trade Atlas, IMF

decade progressed, the yen depreciated against the dollar causing the price of U.S. citrus to rise and the volume of U.S. citrus sales to fall.

Japan's Imported Citrus Market: Total Citrus Imports and Major Competitors' Market Shares

The U.S. market share of Japan's citrus imports declined to 80 percent in 2000 from a high of 98 percent in 1989. Increased imports from South Africa, Israel, and Chile account for the United States relative decline. Japan maintains a high tariff rate on oranges during the December to May period when domestic mikan oranges are marketed. This protective tariff limits imports of U.S. oranges shipped during that period and grants an advantage to South African and Australian oranges which enter during the off-season. The favorable tariff treatment, competitive pricing, and improved quality contribute to the success of these competitors.

The decline in grapefruit imports from the United States mimics the general decline in fresh citrus imports. Grapefruit accounts for about half of all citrus imports from the United States. Japan consistently imports approximately 270,000 tons per year. In the early 1990s, the United States supplied virtually all of these imports. As the decade

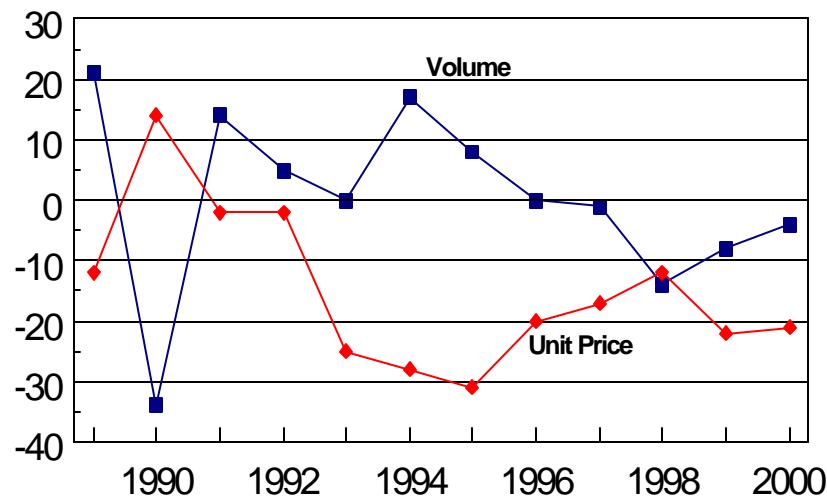


1/ Combined Shares of South Africa, Chile, and Israel

Source: World Trade Atlas

Japan's Imports of U.S. Grapefruit

Percent Growth of Volume and Unit Price in Yen Since 1989-91 1/
Percent Growth



1/ Base Year is Average of 1989-1991

Source: World Trade Atlas, IMF

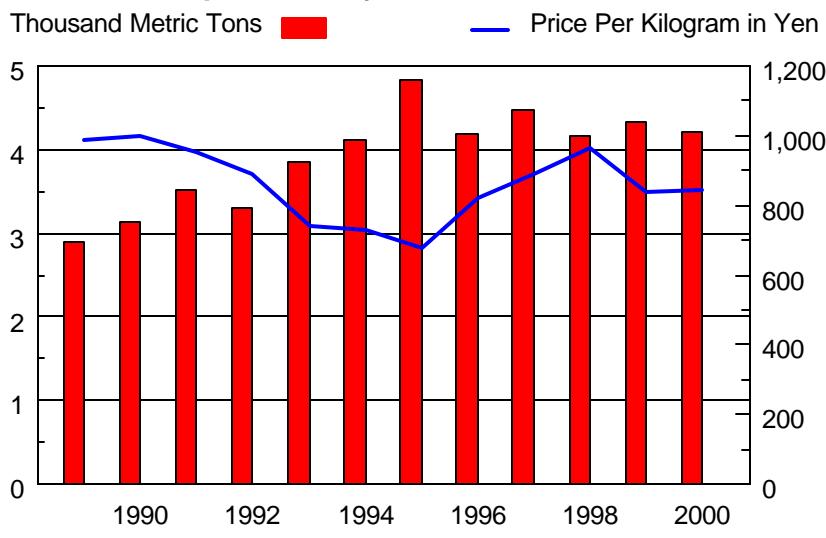
progressed, Japan increasingly looked to South Africa and Israel for imported grapefruit. Given the limited demand for imported grapefruit, this competition served to increase price competition. In 2000, grapefruit imports from South Africa and Israel were priced at \$0.73 and \$0.94 per kilogram, respectively, in comparison to the U.S. price of \$0.97.

Increased Role of Imported Chinese Frozen Strawberries

The improved quality of Chinese strawberries and competitive prices are encouraging Japan's food processors to shift away from the U.S. product in favor of imports from China. After reaching a high in 1994 of 16,644 tons, Japan's imports of U.S. frozen strawberries declined to 11,219 tons in 2000. During this same period, total imports declined by only 634 tons causing the U.S. market share to fall from 64 percent to 52 percent. Traditionally Japan's jam, yogurt, and juice manufacturers have preferred the U.S. product because of its reputation for high quality. However, due to growing price competition among Japan's food processors, buyers have shifted to lower-cost products. For the period between January and August 2000, the average import price of Chinese frozen strawberries was \$1.04 per kilogram, almost half that of the U.S. product at \$2.07 per kilogram.

**Japan's Imports of Fresh Strawberries from the United States
Import Quantity and Unit Price in Yen**

Imported fresh strawberries from the United States have faired better than the frozen product. Since 1989, Japan's imports of U.S. fresh strawberries have grown 45 percent to 4,197 tons in 2000. The unit price of these imports in yen greatly influenced the quantity demanded. The dollar-denominated unit price remained relatively constant at \$7.25 per kilogram. However, favorable exchange rates made the product more affordable to Japanese consumers. Japanese



Source: World Trade Atlas, IMF

consumers demanded more U.S.- produced strawberries when the yen appreciated, thus lowering the yen-denominated price. When the yen depreciated, imports of U.S. strawberries became more expensive causing Japanese consumers to shift their consumption away from the U.S. product.

United States Maintains Lock on Japan's Shelled Almond Import Market

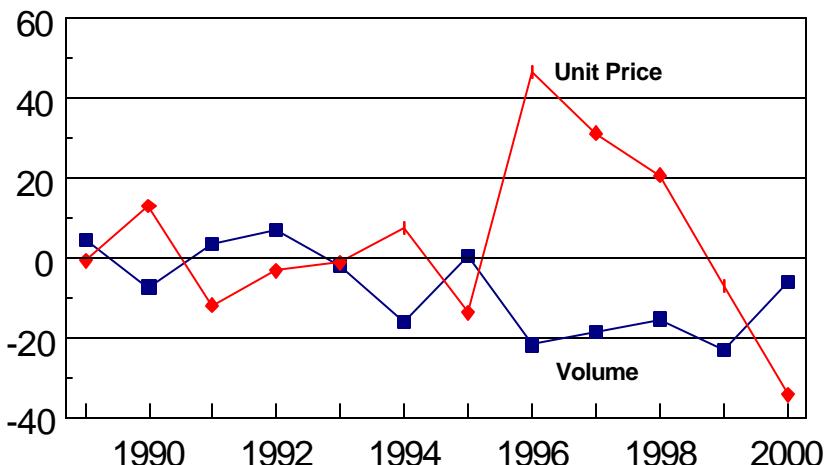
Since 1989, the United States has supplied virtually all of Japan's shelled almond imports. In 2000, the U.S. market share stood at 97 percent. Lacking competition, the level of Japan's imports from the United States is primarily driven by fluctuations in yen-denominated prices.

During the period between 1989 and 1995, the relationship between the import volume of U.S. almonds and their unit price in yen was quite predictable. Japan imported more when prices were low and less when prices were high. However in 1996, this relationship changed as the unit price of U.S. shelled almonds increased substantially. The demand response associated with the price increase is weaker than expected due to consumers' insensitivity to price increases. In 1996, the yen-denominated unit price increased 70 percent over the previous year due to a 50-percent drop U.S. production the year before; however, demand fell by only 22 percent.

The increased unit price in yen of U.S. shelled almonds had two results: (1) Japan reduced its total volume of almond imports from the world and (2) other suppliers, such as Australia and Spain, entered the market as low-priced competitors. Japan's total volume of shelled almond imports fell from 22,569 tons in 1995 to 17,970 the following year. This reduced level of imports continued through the end of the decade. The Japanese also shifted almond imports from the United States to Australia and Spain, causing the United States to lose market share slightly.

Japan's Imports of U.S. Shelled Almonds:

Percent Growth of Volume and Unit Price in Yen Since 1989-91 1/
Percent Growth



1/ Base Year is Average of 1989-91

Source: World Trade Atlas, IMF

(Prepared by Mathew Gerard with support from Robert Knapp.)

Organic Updates

Mad Cow Disease Found on Organic Farm in France

French media reported that in Jura, in eastern France, one cow on a certified organic farm was infected with Bovine Spongiform Encephalopathy (BSE). The 8-year-old milk cow was converted to organic agriculture a year and a half ago. In its first years, the animal was fed with meat and bone meals, which are strictly forbidden in organic agriculture. The certifying agency ECOCERT had certified the breeding farm (110 head) organic according to EU regulations in place since August 2000. Converting a breeding operation from traditional agriculture to organic requires 24 months for soils and 6 months for milk cows. Beef animals older than 16 months must be raised on organic feeds for at least 3/4 of their life. Animals 16 months or younger must have been fed organic feeds for at least 12 months. In comparison, U.S. standards state that any animal sold for meat must be raised organically from the last third of gestation. Even dairy farmers in the United States who think they will sell their old cows for meat, must start off with organic cows.

Presently, about 3,500 breeders in France are certified organic, and their number is increasing. In 1999, 27,000 milk cows (an increase of 37 percent compared to 1998) and 23,000 beef animals (up 45 percent) were certified organic.

BSE Crisis Boosts Consumption of Organic Dairy Products in Germany

German cheese producers report that the demand for cheeses increased by 16 percent in January 2001 compared to January 2000. The cheese industry calls this a BSE effect. Consumers replaced the traditional sliced sausage with cheese. Especially trendy are organic dairy products with guaranteed origin labeling. The organic dairy processors are relatively lucky, in that prior to the BSE crisis, as much as 50 percent of the organically produced milk was being marketed through traditional channels without a profitable mark-up representing its organic origin. Now, in the face of higher demand, more of this organically-produced milk is actually being processed into organic cheese, yogurt and other organic dairy products.

However, since organic dairy products are not differentiated in quality or appearance from conventional dairy products, the German dairy industry is pessimistic that consumers will be willing to continue to pay higher prices for organic products after the BSE shock fades. In 2000, German farmers delivered 27.21 million tons of milk for processing to dairies, an increase of 0.9 percent over 1999, of which less than 1 percent was organic.

French Organic Imports From Third Countries Booming

France is the leading European producer of conventional agriculture and the largest exporter, but it is not able to meet its demand for organic products. Authorization to import organic products from third countries (those outside the EU, including Israel, Switzerland, Hungary, Argentina and Australia) increased from 1,370 tons in 1993 to 21,519 tons in 1999. More than 110,000 tons of organic oilseeds and grains have been imported in 1998 and 1999, as well as 50 million liters of milk from Germany and fresh fruits and vegetables from Spain and Italy. France is also short in organic bovine, poultry, sheep, eggs and butter. In 1985, France was the leading producer of organic commodities in the EU, but is now reported to have fallen behind Italy, Germany, Austria and Sweden.

Japan's Organic Vegetable Imports From China Increasing

Nichirei, a large frozen-food importer in Japan, is planning to start selling frozen organic vegetables from China in supermarkets nationwide this spring, according to the Japan Economic Newspaper. Nichirei was able to reduce prices by contracting with local Chinese vegetable farmers and processing the final product in China. Similarly, last fall, leading supermarket retailer JUSCO began selling frozen spinach, green asparagus, onions, and broccoli imported from China as part of their "Top Value Green Eye" private brand. Both companies' products will be certified under Japan's new JAS organic standard, which took effect April 1.

For more news on organics, see HTP's monthly newsletter "Organic Perspectives," available at the HTP home page: www.fas.usda.gov/htp/organics/organics.html The newsletter contains reports on organics from around the world gleaned from attache reports, trips made by HTP's organics staff, and other sources. The newsletter also covers items of interest about the U.S. national organic program and the domestic organic industry. A list of upcoming conferences, trade shows and other events is included in every issue.

World Trade Situation and Policy Updates

Japan Inspection Slowdown Could Impact U.S. Vegetable Sales

Japan's Ministry of Agriculture, Forestry, and Fisheries (MAFF) has instructed its port inspectors to cut back on the number of daily inspections of imported vegetables, ostensibly for food safety and/or quarantine-related concerns. MAFF indicated that it will set daily ceilings of inspection work to be carried out at seaports and airports. Import quantities in excess of the daily ceiling would be held for inspection the following day. According to the Ministry of Finance, Japan's imports of fresh vegetables in CY 2000 totaled approximately 930,000 tons, a 50-percent increase from the level posted in 1996. While China is by far the leading supplier of Japan's imported vegetables, the United States shipped over \$170 million (nearly 300,000 tons) in vegetables to Japan in CY 2000. Based on the reports to date, only vegetables, not fruits, are subject to the new inspection caps.

Argentina Raises Import Duties for Fruits and Vegetables: According to the Agricultural Counselor's office, on April 10, 2001, the government of Argentina raised import duties for the majority of fresh fruits and vegetables and for processed products. According to reports, the Minister of Economy raised import duties as part of a new economic and fiscal policy to combat the ongoing recession. The increased tariffs, which cover most consumer goods, have been raised to the bound rates of 35 percent in some cases. Import duties in Chapter 7, which covers edible vegetables, were increased to 25 percent. Chapter 8 import duties, on edible fruit and nuts, were increased to 25 percent, except for the duty on almonds, which was not raised. The increases in import duties coincide with the recent opening of the Argentine market to citrus fruit from California and Florida and to stone fruit from California. In CY 2000, U.S. exports of horticultural products to Argentina totaled \$33 million.

Tart Cherry Growers Vote to Amend Marketing Order

Tart cherry growers and processors in Michigan, New York, Pennsylvania, Oregon, Utah, Washington, and Wisconsin voted to make two amendments to their marketing order program. One amendment clarifies the current limitation on the number of Cherry Industry Administrative Board members that may be affiliated with a single "sales constituency" by changing the definition of that term. The other amendment simplifies the method used to establish volume regulations for tart cherries. Some 375 tart cherry producers, or about 42 percent of the producers eligible to vote, cast ballots.

USDA Proposes Plan to Assist Potato Growers

USDA is proposing to pay russet potato growers up to \$10.25 million to divert a portion of their year 2000 crop for charitable food institutions, livestock feed, and ethanol production. Increased harvested acreage and record yields in 2000 combined to push russet potato production past 500 million hundredweight for the first time in history, causing grower prices to plummet. The National Agricultural Statistics Service

reported the March 2001 season-average grower price for all uses at \$5.62 per hundredweight down 10 percent from the March 2000 average of \$6.26 and the lowest March grower price since the 1997 crop year. Record potato crops in Canada and Europe have compounded the domestic market problem, limiting U.S. sales in Canada, Europe, and Asia. Payments for diverting 2000 crop russet potatoes are targeted at \$1.00 per hundredweight. Potatoes offered for diversion must meet specific minimum U.S. Grade standards and must be inspected and certified by federal or federal-state inspectors.

United States and European Union Resolve Banana Dispute

The U.S. Government and the European Commission reached an agreement to resolve their long-standing dispute over bananas. The agreement provides for a transition to a tariff-only system by 2006. During the transition, bananas will be imported into the European Union through import licenses distributed on the basis of past trade. In the past, two European Union banana regimes were challenged successfully in the World Trade Organization, prompting U.S. retaliation against EU products. From July 1, 2001, the United States will suspend the sanctions imposed against EU imports since 1999. The European Commission will adjust the quantities in the various quotas, in order to expand access for Latin American bananas.

U.S. Desert Grape Growers File Anti-dumping Petition against Mexico and Chile

On March 30, 2001, the Desert Grape Grower League (producer members) filed an anti-dumping petition against imported grapes from Chile and Mexico. This group collectively represents the industry producing spring table grapes. The list of petitioners comprises 18 growers with concerns about late season imported product overlapping with the marketing of U.S. early season grapes. In this case, the industry is seeking to define itself based on seasonality (i.e., the 2nd quarter of the calendar year). U.S. imports of grapes from Chile in CY 2000 totaled 359,678 tons (\$388 million), up from the previous year's total of 274,935 tons (\$305 million). During the April 1 through June 30, 2000 period, imports from Chile were 59,604 tons, up nearly 72 percent from the same period the previous year. U.S. imports of Mexican grapes in 2000 totaled 90,749 tons (\$143 million), compared to the 1999 total of 87,632 tons (\$211 million). Grape imports from Mexico during the second quarter also showed year-over-year increases with shipments equaling 85,931 tons in 2000, compared to 79,564 tons the previous year. Total shipments of Chilean and Mexican grapes to the United States increased nearly 25 percent from 1999 to 2000.

Thailand Increases Excise Taxes on Alcoholic Beverages, Including Wine

The Royal Thai Government (RTG) has recently increased excise taxes on alcoholic beverages, including wine, to help offset a continuing budget deficit. While the tax increase for wine is 5 percentage points (i.e., 55% to 60%), the total cost of imported wine could rise by an estimated 68 percent due to the automatic triggering of other tax increases (interior tax, value added tax), according to the GAIN report submitted by the U.S. Agricultural Counselor's office. The resulting price increases at the consumer level are expected to further dampen sales prospects in an already depressed market. The U.S. wine industry's

exports to Thailand had appeared poised to regain the ground lost in 1998 as a result of the Asian financial crisis. But any recovery in 1999 was stymied by the RTG's anti-import campaign targeted against a number of products, including wine. The initiatives were aimed at curbing spending of hard currency on imports and essentially wiped out sales of expensive vintages. U.S. wine sales to Thailand peaked in 1996 at \$5 million, before falling to a low of \$0.5 million in 1998. Sales had gradually climbed back to reach \$1 million in 2000.

Israel's Demand For U.S. Walnuts Grows in CY 2000

U.S. exports of walnuts to Israel for CY 2000 totaled \$11.3 million, an increase of 39 percent compared to the same period last year. This was due, in part, to the 1999/2000 record U.S. walnut harvest which totaled 256,734 tons, a 20-percent increase over the previous year's harvest. As a consequence of this record harvest, world prices for walnuts were low and the quality of the product remained very high. Israel prefers to import the top quality type walnut which is used mainly for snack foods and products of that nature. To date, Israel is the sixth largest market for U.S. walnuts. If Israel's demand continues to increase at such a fast pace, experts believe that it will soon become the United States' fourth-largest market for walnuts, surpassing both Canada and Italy which are currently the fourth- and fifth-largest market, respectively.

Anti-Dumping Petition Filed Against Canadian Hothouse Tomatoes

On March 28, several U.S. tomato producing firms joined in filing an anti-dumping petition against Canadian hothouse tomatoes. According to Census Bureau data, U.S. exports of tomatoes to Canada in CY 2000 totaled 144,950 tons (\$121 million), up from the previous year's total of 137,445 tons (\$104 million). U.S. imports of Canadian tomatoes in that same year reached 101,390 tons (\$161 million), compared to 1999's total of 79,554 tons (\$120 million). According to the Census data, shipments of Canadian hothouse tomatoes to the United States increased over 230 percent from 1999 to 2000, and now account for roughly half of the total volume of Canadian tomato shipments to United States in CY 2000. By comparison, hothouse tomatoes accounted for just 18 percent of the Canadian volume in 1999.

Export News and Opportunities

Are you interested in exporting but hesitating because you are concerned about getting paid? If so, do not overlook the billions of dollars the U.S. Department of Agriculture (USDA) makes available to help facilitate sales to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without credit guarantees. Invest the time to learn more about the Export Credit Guarantee Program (GSM-102) and Supplier Credit Guarantee Program (SCGP) to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. USDA does not provide financing, but it guarantees payments due to U.S. exporters in case the foreign banks or importers default.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

<http://www.fas.usda.gov/export.html>

GSM-102

On March 29, USDA amended the GSM-102 Program for Russia to add Russian banks. Any bank in the United Kingdom and Russia approved by the Commodity Credit Corporation (CCC) is eligible. Exporters are advised to obtain from their foreign buyer the name of the CCC-approved foreign bank that will be opening the letter of credit. All other terms and conditions as previously announced remain the same. The previous announcement pertinent to this allocation is PR 0017-01.

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The Commodity Credit Corporation (CCC)-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceed that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter

or the assignee may file a claim with USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

Supplier Credit Guarantee Program

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

GSM-102 and SCGP

The following tables present the FY 2001 GSM-102 and SCCP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911 or Rochelle Foster on 202-720-2936).

FY 2001 GSM-102 COVERAGE

Country	Announced Allocations --coverage in millions of dollars--
Algeria	25
Azerbaijan	5
Baltic Region	15
Caribbean Region	95
Central America Region	110
Central Europe Region	10
China/Hong Kong Region	300
Dominican Republic	25
East Africa	5
Egypt	100
India	20
Indonesia	500
Jordan	50
Kazakhstan	10
Korea	575
Lebanon	10
Malaysia	100
Mexico	500
Morocco	10
Nigeria	9
Peru	80
Philippines	100
Poland	25
Romania	25
Russia	40
South America Region	370
Southeast Asia Region	90
Southeast Europe Region	25
Southern Africa Region	50
Sri Lanka	35
Thailand	290
Tunisia	30
Turkey	345
West Africa Region	14

FY 2001 SUPPLIER CREDIT GUARANTEE COVERAGE

Country	Commodity	Announced Allocations	Exporter Applications Received	Balance
--coverage in millions of dollars--				
Azerbaijan		5.00	0.00	5.00
Baltic Region		10.00	3.66	6.34
Caribbean Region		10.00	0.80	9.20
Central America Region		15.00	15.00	0.00
Central Europe Region		20.00	0.00	20.00
China/Hong Kong Region		50.00	0.00	50.00
Egypt		10.00	7.40	2.60
	Fruit, Fresh (180)		0.50	
Israel		20.00	0.08	19.92
	Wine (180)		0.08	
Japan		50.00	0.01	49.99
	Vegetables, Fresh (180)		0.01	
Kazakhstan		5.00	3.00	2.00
Kenya		2.00	0.00	2.00
Korea		50.00	2.01	47.99
	Fruit, Fresh (180)		1.66	
	Wine (180)		0.10	
Macedonia		5.00	3.20	1.80
Mexico		100.00	60.62	39.38
	Wine (180)		0.01	
Poland		10.00	0.04	9.96
Russia		10.00	5.60	4.40
South America Region		20.00	0.24	19.76
Southeast Asia Region		50.00	0.48	49.52
	Fruit/Vegetable Concentrates (180)		0.01	
	Fruit, Frozen (180)		0.01	
	Tree Nuts (180)		0.25	
	Wine (180)		0.01	
Southeast Balkans Region		75.00	0.00	75.00
Southeast Europe Region		20.00	0.00	20.00
Taiwan		50.00	0.01	49.99
	Wine (180)		0.01	
Turkey		5.00	0.15	4.85
	Tree Nuts (180)		0.15	
West Africa Region		45.00	1.83	43.17
Yemen		10.00	0.00	10.00

Top United States Horticultural Product Exports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Feb. FY 2000	Oct. - Feb. FY 2001
--- 1,000 Dollars ---							
Almonds	942,620	879,032	772,891	696,818	586,751	270,521	341,041
Wine & Wine Prdts.	305,546	390,376	510,923	545,287	549,559	225,327	215,234
Frz. French Fries	256,289	294,417	313,209	343,216	339,475	135,454	151,012
Fresh Apples	371,773	412,855	328,068	375,869	334,217	154,103	207,054
Fresh Grapes	304,322	313,836	274,953	283,865	328,221	159,954	196,017
Orange Juice All	274,362	305,172	295,564	307,165	290,244	107,346	107,810
Oranges	277,184	308,055	339,114	159,585	267,145	79,893	110,483
Potato Chips	166,188	145,468	226,987	257,355	243,014	112,927	89,164
Grapefruit	258,903	240,408	189,744	221,443	207,723	128,970	112,909
Fresh Lettuce	132,866	146,640	173,746	157,262	179,926	75,139	90,336
Beer	377,324	341,784	280,088	211,861	176,642	69,406	68,698
Fresh Cherries	130,790	140,650	113,556	154,793	169,150	2,346	2,272
Walnuts	195,802	195,209	153,863	154,449	149,907	96,912	117,560
Fresh Tomatoes	100,467	123,789	122,345	127,153	148,248	47,376	65,941
Raisins	200,596	204,388	199,733	198,817	146,820	64,772	65,255
Proc. Sweet Corn	137,011	167,490	139,068	148,050	145,380	64,093	55,303
Prunes	139,090	138,398	133,732	133,885	133,027	62,145	67,397
Fresh Broccoli	84,215	92,693	90,778	100,603	126,610	41,570	37,847
Strawberries	91,738	97,020	93,349	102,464	118,905	27,618	23,586
Peaches	71,935	92,883	74,512	95,130	101,613	6,135	10,325
Total Other	5,220,264	5,593,378	5,492,927	5,524,114	5,794,621	2,344,632	2,506,776
GRAND TOTAL	10,039,285	10,623,941	10,319,150	10,299,184	10,537,198	4,276,639	4,642,020

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Exports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Feb. FY 2000	Oct. - Feb. FY 2001
--- 1,000 Liters ---							
Fresh Broccoli	129,168	130,999	126,791	154,514	182,863	62,210	53,310
Fresh Apples	565,910	690,595	539,685	664,969	568,158	263,337	380,710
Orange Juice All	442,080	565,332	553,175	554,951	551,087	197,709	184,903
Oranges	497,077	569,739	609,433	247,419	487,706	149,507	207,643
Frz. French Fries	350,638	396,738	438,425	468,826	469,185	187,676	213,806
Grapefruit	497,401	484,417	387,216	428,784	389,564	241,208	222,694
Fresh Lettuce	286,256	294,571	303,816	312,563	328,311	144,599	152,481
Wine & Wine Prdts.	170,332	208,786	266,294	274,696	286,251	116,879	123,426
Beer	614,202	536,362	425,523	330,158	277,230	109,446	101,125
Fresh Grapes	240,704	236,400	214,569	221,158	269,999	127,112	149,617
Almonds	301,970	187,953	202,968	200,847	222,299	107,191	122,825
Proc. Sweet Corn	168,644	203,613	171,294	186,153	186,184	84,559	70,581
Fresh Tomatoes	131,308	153,657	133,687	148,271	181,810	60,631	66,034
Pears	144,493	126,603	156,807	145,816	162,592	88,899	91,226
Peaches	74,841	103,442	80,023	97,974	111,017	6,967	12,469
Lemons	132,177	120,330	113,392	113,931	105,990	46,464	52,336
Potato Chips	59,930	53,614	103,025	104,366	103,616	52,165	34,696
Raisins	118,942	115,215	120,741	104,225	84,054	33,922	45,897
Prunes	62,548	67,530	70,864	68,412	66,958	30,740	37,463

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2000	FY 2001	Oct. -Feb.	Oct. -Feb.
--- 1,000 Dollars ---									
Wine & Wine Prdts.	1,360,163	1,629,254	1,829,709	2,148,127	2,271,772	971,630	964,256		
Beer	1,302,759	1,443,326	1,677,002	1,865,087	2,126,042	720,567	809,938		
Bananas & Plantns	1,156,330	1,194,458	1,188,442	1,180,474	1,098,402	431,530	441,853		
Nursery Products	538,109	565,267	632,672	673,281	745,826	309,163	333,885		
Cut Flowers	573,399	572,926	630,067	578,847	623,184	287,213	268,134		
Fresh Tomatoes	679,977	611,612	735,180	713,029	608,514	241,400	345,036		
Fresh Grapes	344,799	386,183	440,659	545,770	518,260	227,097	260,950		
Cashews	300,206	292,315	339,490	389,300	488,470	204,539	160,880		
Fresh Peppers	199,403	251,908	343,606	324,863	451,811	183,825	199,246		
Frz. French Fries	103,699	156,831	216,576	252,437	321,905	129,003	136,038		
Essential Oils	317,821	322,447	350,086	317,481	310,513	134,089	125,895		
All Apple Juices	327,267	354,632	228,735	210,586	278,865	100,345	90,904		
Fresh Melons	198,811	226,502	250,921	277,917	259,788	111,980	129,337		
All Orange Juices	223,809	240,072	211,353	285,927	243,386	111,956	74,276		
Pineapple: Presrvd	199,358	208,941	187,116	245,529	201,027	86,086	70,481		
Olives	182,024	184,217	181,730	199,926	185,239	80,402	82,519		
Fresh Cucumbers	115,608	100,823	154,634	138,231	168,696	78,256	84,166		
Fresh Mangos	100,039	123,009	125,047	139,041	142,005	36,100	33,214		
Fresh Onions	146,632	127,447	151,990	135,587	131,707	69,889	80,516		
Total Other	3,721,871	4,088,077	4,501,501	5,241,397	5,250,565	2,317,873	2,394,529		
GRAND TOTAL	12,092,084	13,080,247	14,376,516	15,862,837	16,425,977	6,832,943	7,086,053		

1/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2000	FY 2001	Oct. -Feb.	Oct. -Feb.
--- 1,000 Liters ---									
Wine & Wine Prdts.	336,294	432,192	428,664	419,843	481,362	191,923	206,322		
Beer	1,446,244	1,612,379	1,869,577	2,072,387	2,290,531	772,788	869,594		
Bananas & Plantns	3,973,927	3,911,294	4,135,832	4,373,166	4,350,816	1,780,218	1,664,255		
Nursery Products	2,040,035	2,206,085	2,460,306	2,765,380	2,860,717	1,180,782	1,259,801		
Cut Flowers	2,807,090	2,770,092	2,770,186	2,708,264	2,804,814	1,346,891	1,192,063		
Fresh Tomatoes	724,621	743,205	856,852	722,519	708,742	322,502	381,383		
Fresh Grapes	341,098	351,567	419,956	387,165	452,182	182,383	205,975		
Cashews	61,037	62,669	74,373	69,549	86,244	33,295	34,715		
Fresh Peppers	269,558	284,221	319,671	345,425	352,149	165,256	151,001		
Frz. French Fries	170,308	269,794	353,931	397,455	470,586	189,581	205,352		
Essential Oils	33,394	43,609	90,334	45,219	65,379	39,426	14,443		
All Apple Juices	856,697	1,084,986	1,016,823	1,139,079	1,169,591	454,987	433,013		
Fresh Melons	661,426	779,005	860,437	873,052	899,000	402,747	402,695		
All Orange Juices	836,648	1,116,798	1,063,239	1,326,139	1,284,975	610,567	424,406		
Pineapple: Presrvd	309,742	295,858	255,051	330,773	329,198	135,764	114,714		
Olives	72,287	81,511	92,958	96,959	93,906	36,956	45,772		
Fresh Cucumbers	295,907	302,306	327,745	336,026	346,767	196,430	202,552		
Fresh Mangos	166,058	191,115	188,767	213,195	231,075	40,178	43,395		
Fresh Onions	266,779	261,088	259,188	246,548	224,069	108,081	114,176		

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic Units	2000 Mar	2001		% Change Last Month	% Change Last Year
			Feb	Mar 1/		
Dollars/unit						
Grapefruit 2/	Box	3.83	2.07	1.53	-26.1%	-60.1%
Lemons 2/	Box	10.2	1.37	2.9	111.7%	-71.6%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	3.82	3.29	4.13	25.5%	8.1%
Tangelos 2/	Box	0	-0.28	0	-100.0%	n/a
Tangerines 2/	Box	7.38	10.2	10.95	7.4%	48.4%
Templets 2/	Box	1.9	2.03	0.77	-62.1%	-59.5%
Apples, fresh 3/	Lb.	0.198	0.152	0.142	-6.6%	-28.3%
Grapes	Lb.	0	0	0	n/a	n/a
Peaches	Ton	0	0	0	n/a	n/a
Pears, fresh 3/	Ton	334	251	274	9.2%	-18.0%
Strawberries, fresh	Lb.	0.645	1.07	0.951	-11.1%	47.4%
Asparagus 4/	Cwt.	98.6	256	181	-29.3%	83.6%
Broccoli 4/	Cwt.	26.8	32.3	28.6	-11.5%	6.7%
Cantaloupes	Cwt.	0	0	0	n/a	n/a
Carrots 4/	Cwt.	11.8	16.7	17.3	3.6%	46.6%
Cauliflower 4/	Cwt.	31.7	37.5	24.7	-34.1%	-22.1%
Celery 4/	Cwt.	12.9	15	17.6	17.3%	36.4%
Sweet Corn 4/	Cwt.	18.8	35.1	28.1	-19.9%	49.5%
Cucumbers 4/	Cwt.	28.5	0	32.7	n/a	14.7%
Lettuce 4/	Cwt.	14	23.2	20.9	-9.9%	49.3%
Onions 4/	Cwt.	6.67	14.1	15.2	7.8%	127.9%
Snap Beans 4/	Cwt.	43.7	69.4	42.3	-39.0%	-3.2%
Tomatoes 4/	Cwt.	30	28.7	44.7	55.7%	49.0%

1/ Preliminary.

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.

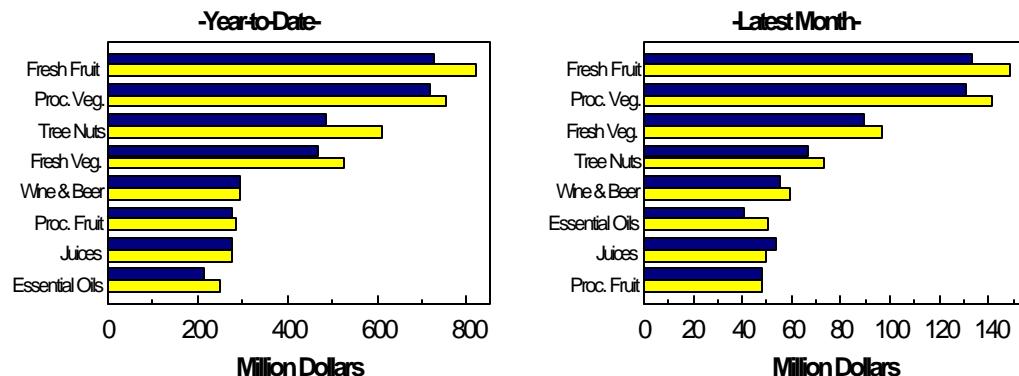
U.S. Horticultural Product and Market Export Summaries

FY00 and Latest Month (February)

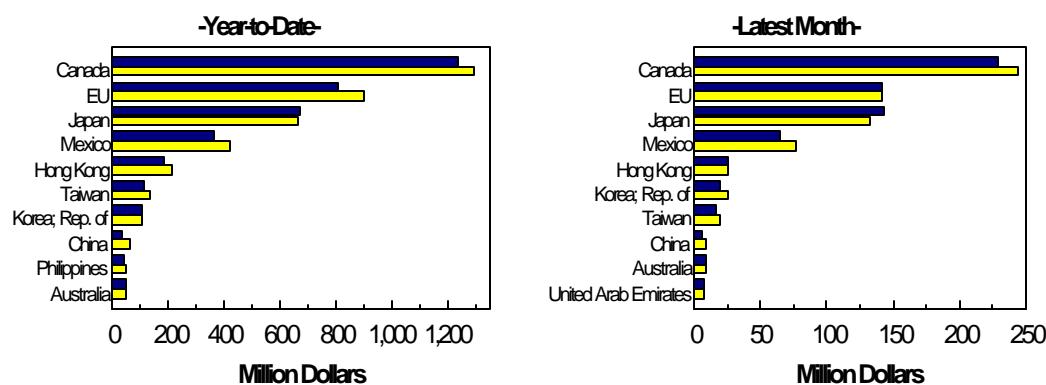
Comparisons

■ FY00 ■ FY01

Selected Product Summary



Top Ten Market Summary



U.S. Exports of Selected Horticultural Products

Product and Country			Quantity				Values (1000 Dollars)					
Country Region	Feb FY 2000	Feb FY 2001	Oct-Feb FY 2000	Oct-Feb FY 2001	Oct-Sep FY 2000	Feb FY 2000	Feb FY 2001	Oct-Feb FY 2000	Oct-Feb FY 2001	Oct-Sep FY 2000		
Essential Oils	Mt											
European Union	1,184	1,061	5,316	6,086	16,934	11,780	14,134	61,776	73,800	174,020		
Canada	757	824	3,625	3,902	10,590	10,355	11,115	50,595	52,849	140,407		
Mexico	476	363	2,324	1,312	5,448	3,781	4,374	21,474	18,699	50,995		
Brazil	82	145	672	786	1,532	645	1,198	5,554	5,588	13,704		
Japan	349	257	1,333	1,596	3,862	3,920	4,968	16,117	20,195	60,937		
Other Countries	1,071	1,699	5,770	7,872	14,859	10,226	14,490	59,750	78,287	151,677		
Subtotal:----	3,919	4,349	19,040	21,554	53,225	40,707	50,279	215,267	249,418	591,739		
Potato Chips	Mt											
Canada	1,277	1,236	7,835	7,342	19,752	2,641	2,371	16,252	14,209	40,679		
Mexico	387	333	9,387	1,772	12,002	1,546	1,378	12,175	6,942	22,722		
Korea, Republic o	275	469	3,085	2,531	7,264	764	1,350	6,972	7,158	18,599		
Hong Kong	879	426	3,727	2,444	6,665	2,204	1,146	8,873	6,669	16,810		
Japan	1,884	1,508	10,747	7,862	23,290	4,781	4,418	27,115	22,535	60,470		
Other Countries	2,887	2,363	17,385	12,744	34,644	7,346	5,669	41,541	31,651	83,733		
Subtotal:----	7,589	6,335	52,165	34,696	103,616	19,283	16,331	112,927	89,164	243,014		

